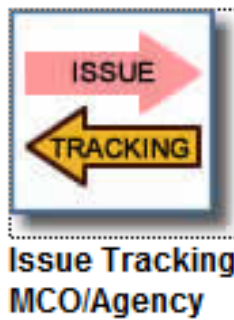




Issue Tracking Instructions (MCO)



January 24, 2014

Table of Contents

General Instructions.....	2
Accessing the Application	3
Logging-In.....	4
Accessing the Issue Tracking Application.....	5
Navigation – Issue Tracking Listing	6
Issue Tracking Listing – Interactive Report Functions.....	8
Issue Tracking Listing – Descriptions.....	9
Issue Tracking Listing – Filter	10
Issue Tracking Listing – Sorting	11
Issue Tracking Listing – Control Break on Information	12
Issue Tracking Listing – Highlight Information.....	13
Issue Tracking Listing – Saving	14
Issue Tracking Listing – Reset Report.....	15
Issue Tracking Listing – Downloading Data.....	16
Issue Tracking Listing Details	17
Upload File Attachment Utility	23
Viewing an Attachment	25
Deleting an Attachment.....	26
Logging-Out.....	27

General Instructions

Overview

The Issue Tracking Application is a KDADS web application.

System Requirements and Browser Settings

- **Firewall Settings** may need added.
 - To check if you will be able to access the KDADS Web Application site, follow the steps on pages 3-4. If the sign in page does not display, our site will need to be added to your firewall. Please contact the KDADS Help Desk for the specific address/port to be added to the firewall.
 - Internet Connection
 - Internet Browser:
 - Microsoft Internet Explorer 6.0 or newer - Recommended
 - Firefox – current version
 - Disable all Pop-Up blockers
-

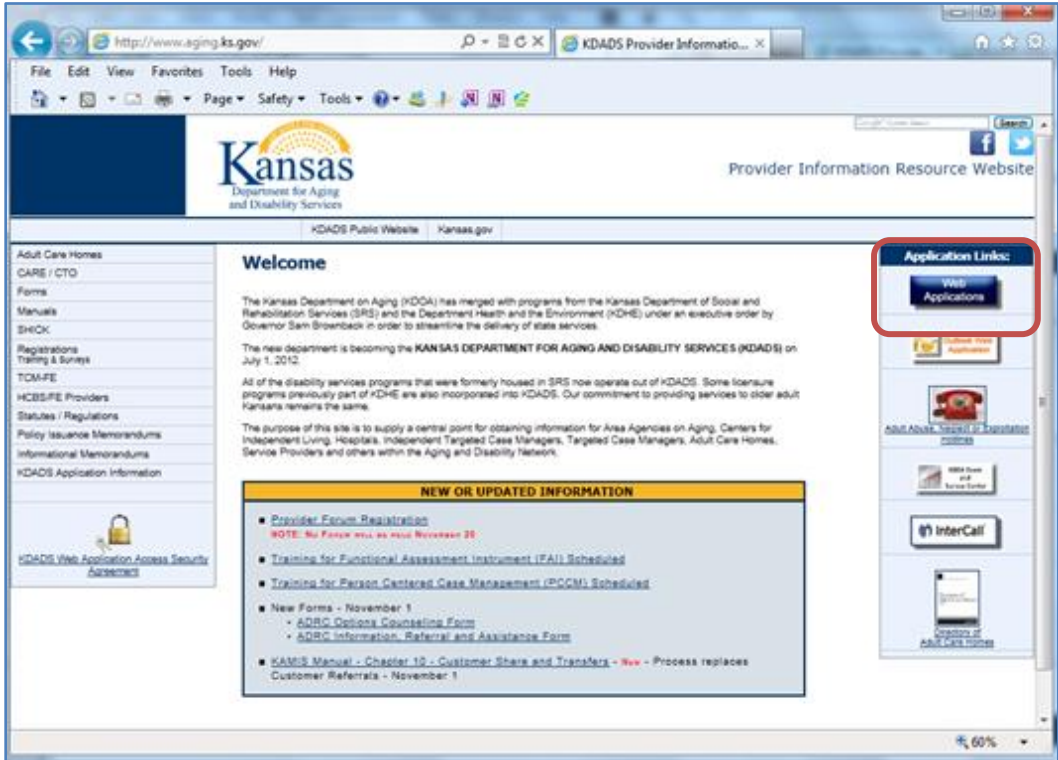
Contact Persons

Issue	Contact Person
Application How To Questions Password Change	KDADS Help Desk Phone: (785) 296-4987 or (800) 432-3535 E-Mail: HelpDesk@kdads.ks.gov
Questions about the Issue Tracking Policies and Guidelines.	Phone: (800) 432-3535

Accessing the Application

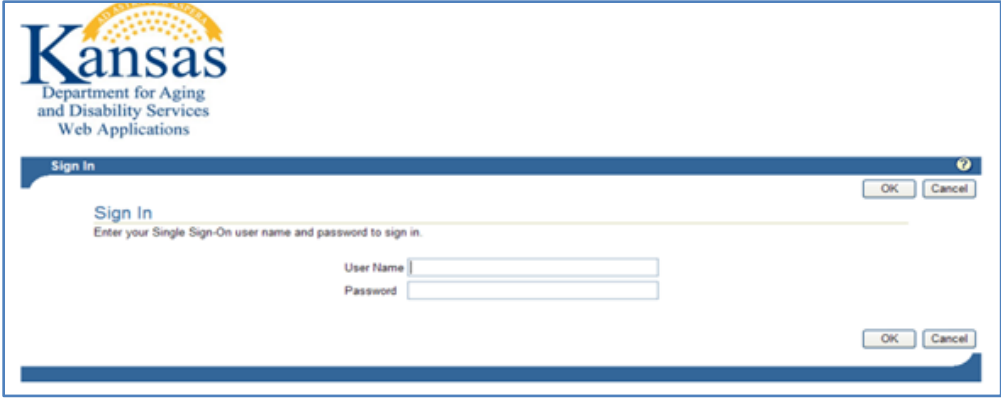
Introduction Use Microsoft Internet Explorer or FireFox browser to access the KDADS web application site. All KDADS Web Applications are secured and encrypted.

How To Follow the steps in the table below to accessing the login page for the KDADS Web Application.

Step	Action	Result
1.	Open the internet browser. Access the KDADS Provider Information Resource Web Site. www.aging.ks.gov	The KDADS Provider Web Site Home Page will be displayed.
		
2.	Select the Web Applications link under the “Applications Link”.	The KDADS Web Application Login page will display.

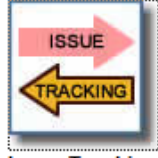
Logging-In

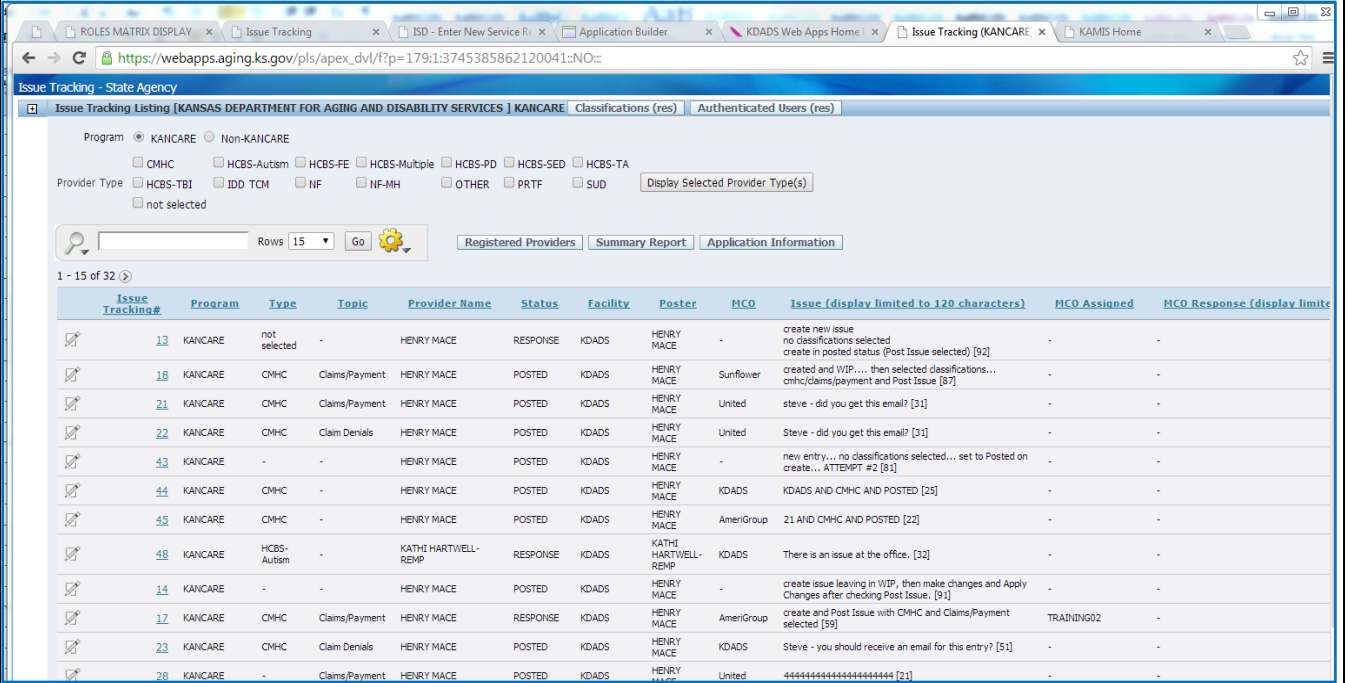
How To Follow the steps in the table below to complete the Login process.

Step	Action	Result
1.	Once the Login page is displayed. Type the User Name . Press Tab .	Insertion point advances.
		
2.	Enter Password . If it is the first time signing into the application, use the initial password that was issued in the e-mail from the KDADS Information Services Division. Click the OK button.	The Web Application Home page will display.

Accessing the Issue Tracking Application

How To Follow the steps in the table below to access the Issue Tracking application.

Step	Action	Result
1.	To access the Issue Tracking Application, click on the Issue Tracking button on the Web Applications Home Page.	 Issue Tracking MCO/Agency
2.	Opens to the Listing page of the Issue Tracking Application. Select the appropriate program type.	



The screenshot shows the 'Issue Tracking - State Agency' interface. At the top, there are tabs for 'Issue Tracking Listing', 'KANSAS DEPARTMENT FOR AGING AND DISABILITY SERVICES', 'KANCARE', 'Classifications (res)', and 'Authenticated Users (res)'. Below the tabs, there are filters for 'Program' (KANCARE, Non-KANCARE) and 'Provider Type' (CMHC, HCBS-Autism, HCBS-FE, HCBS-Multiple, HCBS-PD, HCBS-SED, HCBS-TA, HCBS-TBI, IDD TCM, NF, NF-MH, OTHER, PRTF, SUD). A search bar and a 'Go' button are also present. Below the filters, there are buttons for 'Registered Providers', 'Summary Report', and 'Application Information'. The main content area displays a table of issues with columns: Issue Tracking#, Program, Type, Topic, Provider Name, Status, Facility, Poster, MCO, Issue (display limited to 120 characters), MCO Assigned, and MCO Response (display limited to 120 characters). The table shows 15 rows of data, with the first row being highlighted.

Issue Tracking#	Program	Type	Topic	Provider Name	Status	Facility	Poster	MCO	Issue (display limited to 120 characters)	MCO Assigned	MCO Response (display limited to 120 characters)
13	KANCARE	not selected	-	HENRY MACE	RESPONSE	KDADS	HENRY MACE	-	create new issue no classifications selected create in posted status (Post Issue selected) [92]	-	-
18	KANCARE	CMHC	Claims/Payment	HENRY MACE	POSTED	KDADS	HENRY MACE	Sunflower	created and WIP.... then selected classifications... cmhc/claims/payment and Post Issue [87]	-	-
21	KANCARE	CMHC	Claims/Payment	HENRY MACE	POSTED	KDADS	HENRY MACE	United	steve - did you get this email? [31]	-	-
22	KANCARE	CMHC	Claim Denials	HENRY MACE	POSTED	KDADS	HENRY MACE	United	Steve - did you get this email? [31]	-	-
43	KANCARE	-	-	HENRY MACE	POSTED	KDADS	HENRY MACE	-	new entry... no classifications selected... set to Posted on create... ATTEMPT #2 [81]	-	-
44	KANCARE	CMHC	-	HENRY MACE	POSTED	KDADS	HENRY MACE	KDADS	KDADS AND CMHC AND POSTED [25]	-	-
45	KANCARE	CMHC	-	HENRY MACE	POSTED	KDADS	HENRY MACE	AmeriGroup	21 AND CMHC AND POSTED [22]	-	-
48	KANCARE	HCBS-Autism	-	KATHI HARTWELL-REMP	RESPONSE	KDADS	KATHI HARTWELL-REMP	KDADS	There is an issue at the office. [32]	-	-
14	KANCARE	-	-	HENRY MACE	POSTED	KDADS	HENRY MACE	-	create issue leaving in WIP, then make changes and Apply Changes after checking Post Issue. [91]	-	-
17	KANCARE	CMHC	Claims/Payment	HENRY MACE	RESPONSE	KDADS	HENRY MACE	AmeriGroup	create and Post Issue with CMHC and Claims/Payment selected [99]	TRAINING02	-
23	KANCARE	CMHC	Claim Denials	HENRY MACE	POSTED	KDADS	HENRY MACE	KDADS	Steve - you should receive an email for this entry? [51]	-	-
28	KANCARE	-	Claims/Payment	HENRY MACE	POSTED	KDADS	HENRY MACE	United	444444444444444444444444 [21]	-	-

Navigation – Issue Tracking Listing

Introduction The report displays the issues that have been entered in the Issue Tracking System. The listing is an Interactive Reports, which gives the user a table view then allows the user to utilize filters and other reporting tools to create custom views of the data.

Select the appropriate criteria and click on the **Display Selected Provider Type(s)** button.

Filters

The screenshot shows the 'Issue Tracking Listing' interface for the 'KANSAS DEPARTMENT FOR AGING AND DISABILITY SERVICES'. The 'Program' filter is set to 'KANCARE'. The 'Provider Type' filter is set to 'not selected'. The 'Display Selected Provider Type(s)' button is highlighted with a red box. Below the filters, there is a search field, a 'Rows' dropdown set to '15', and a 'Go' button. The table below shows a list of issues with columns: Issue Tracking#, Program, Type, Topic, Provider Name, Status, Facility, Poster, MCO, and Issue (display limited to 120 charac).

Issue Tracking#	Program	Type	Topic	Provider Name	Status	Facility	Poster	MCO	Issue (display limited to 120 charac)
13	KANCARE	not selected	-	HENRY MACE	RESPONSE	KDADS	HENRY MACE	-	create new issue no classifications selected create in posted status (Post Issue selected) [92]

A report based on the filters selected will display.

The report is interactive with a search field. Enter the criteria and click on the “Go” Button. Additional sorting and filtering options as well as a download utility can be found under the “Gear” icon. Detail instructions regarding additional features of the interactive report are located in this document on page 11.

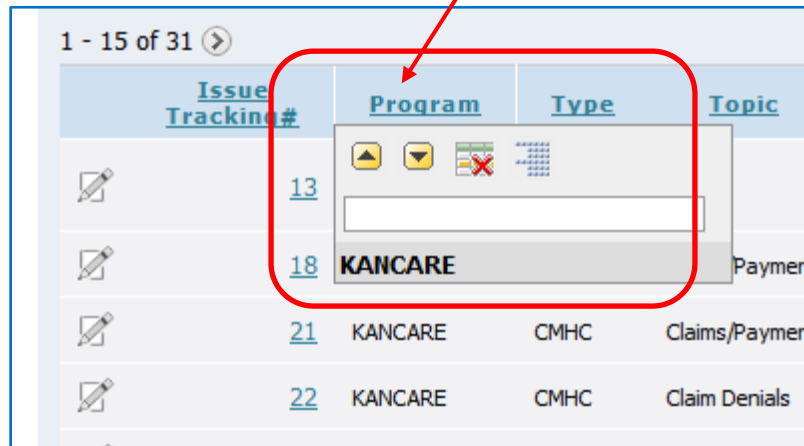
Search Field

The screenshot shows the 'Issue Tracking Listing' interface for the 'KANSAS DEPARTMENT FOR AGING AND DISABILITY SERVICES'. The 'Program' filter is set to 'KANCARE'. The 'Provider Type' filter is set to 'not selected'. The 'Display Selected Provider Type(s)' button is highlighted with a red box. Below the filters, there is a search field, a 'Rows' dropdown set to '15', and a 'Go' button. The table below shows a list of issues with columns: Issue Tracking#, Program, Type, Topic, Provider Name, Status, Facility, Poster, MCO, and Issue (display limited to 120 charac).

Issue Tracking#	Program	Type	Topic	Provider Name	Status	Facility	Poster	MCO	Issue (display limited to 120 charac)
13	KANCARE	not selected	-	HENRY MACE	RESPONSE	KDADS	HENRY MACE	-	create new issue no classifications selected create in posted status (Post Issue selected) [92]

Navigation – Issue Tracking Listing

The report is also interactive by utilizing the column headings to sort or filter by the content.



The screenshot displays a table with the following columns: Issue Tracking#, Program, Type, and Topic. The Program column is highlighted with a red box, and a dropdown menu is open, showing a search bar and a list of programs, with "KANCARE" selected. A red arrow points from the text above to the dropdown menu. The table shows rows for Issue Tracking numbers 13, 18, 21, and 22. Row 18 is highlighted.

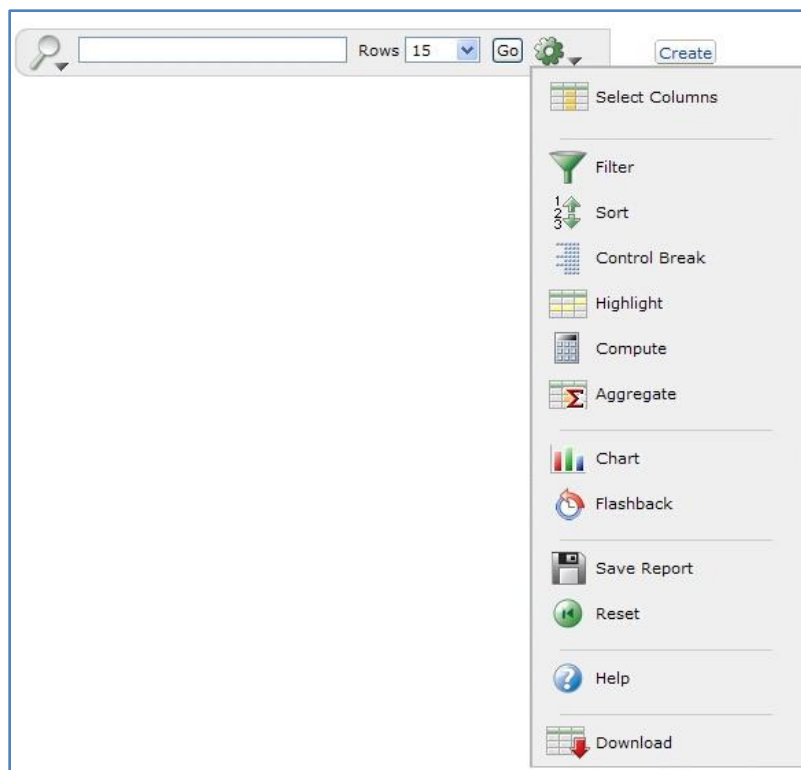
<u>Issue Tracking#</u>	<u>Program</u>	<u>Type</u>	<u>Topic</u>
13			
18	KANCARE		Payment
21	KANCARE	CMHC	Claims/Payment
22	KANCARE	CMHC	Claim Denials

Issue Tracking Listing – Interactive Report Functions

Features Below are the more commonly used reporting tools features offered by interactive reports.

How to














1. Open the Web Application at the Interactive Report view.
2. Click on the gear icon.
3. Report Control List will display.



Functions Covered This instruction guide will cover only the most commonly used report functions. Those functions are Filter, Sort, Control Break, Highlight, Save Report, Reset, and Download.

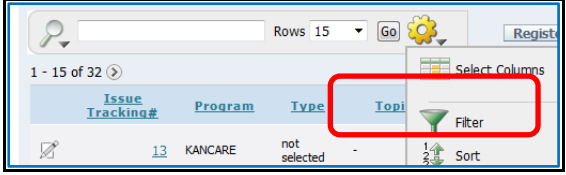
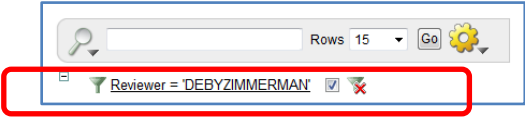
Issue Tracking Listing – Descriptions

Functions Below is the descriptions of the functions available in an interactive report.

Reporting Control List	Action
 Select Columns  Filter  Sort  Control Break  Highlight  Compute  Aggregate  Chart  Flashback  Save Report  Reset  Help  Download	<p>Select Columns – Used to modify the columns displayed. The columns on the right are displayed. The columns on the left are hidden. You can reorder the displayed columns using the arrows on the far right. Computed columns are prefixed with **.</p>
	<p>Filter – Used to filter data for a more detailed view of information.</p>
	<p>Sort – Used to change the column(s) to sort on and whether to sort ascending or descending. You can also specify how to handle nulls (use the default setting, always display them last or always display them first). The resulting sorting is displayed to the right of column headings in the report.</p>
	<p>Control Break – Used to create a break group on one or several columns. This pulls the columns out of the Interactive Report and displays them as a master record.</p>
	<p>Highlight – Highlighting allows you to define a filter. The rows that meet the filter are highlighted using the characteristics associated with the filter.</p>
	<p>Compute – Computations allow you to add computed columns to your report. These can be mathematical.</p>
	<p>Aggregate – Aggregates are mathematical computations performed against a column. Aggregates are displayed after each control break and at the end of the report within the column they are defined. Only numeric columns will be displayed.</p>
	<p>Chart – You can include one chart per Interactive Report. Depending upon the data in the report, the chart function may not be useful.</p>
	<p>Flashback – Not available.</p>
	<p>Save Report – Saves the customized report for future use. You provide a name and an optional description. A tab will be displayed for each report saved.</p>
	<p>Reset – Restores report to the default settings.</p>
	<p>Help – On-line Help on report functions.</p>
	<p>Download – Allows the current report to be downloaded. The download formats is CSV which can be opened through Excel.</p>

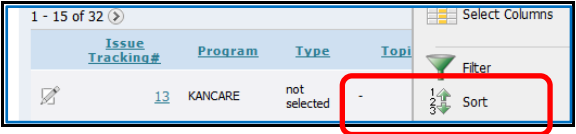
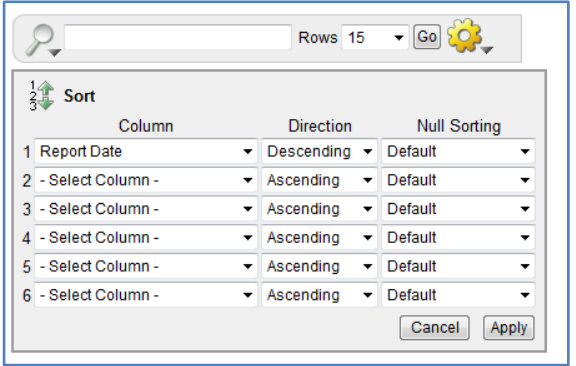
Issue Tracking Listing – Filter

How To Follow the steps in the table below to filter a Report.

Step	Action	
1.	Select Filter from the Control list.	
2.	Select the Column to filter Select the Operator	
3.	Select the Expression . <ul style="list-style-type: none"> By clicking on the drop down arrow at the end of the express field, options will appear if appropriate. 	
4.	Click on the "Go" button. Report will display. The filter criteria will display at the top of the report.	 <p>Check Box = Enable or Disable the filter Filter = Removes the filter</p>

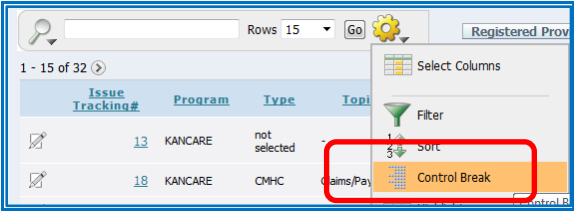
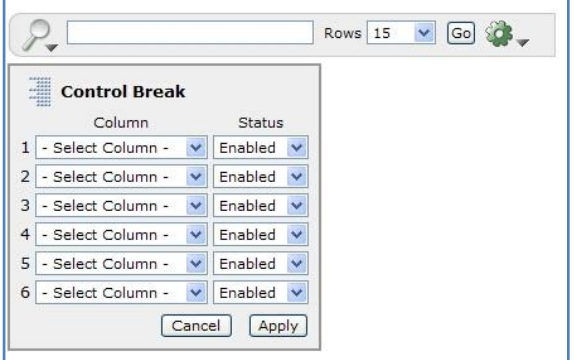
Issue Tracking Listing – Sorting

How To Follow the steps in the table below to sort a Report.

Step	Action	
1.	Select Sort from the Control list.	
2.	Select the Column(s) to be sorted. Select the Direction (Ascending or Descending) Select how the Blank Fields (nulls) should be displayed.	
3.	Click on Apply . Report will display.	


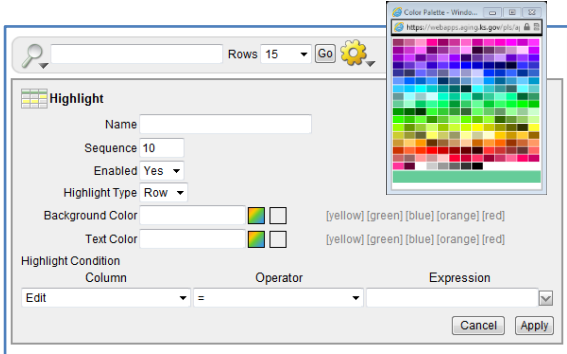
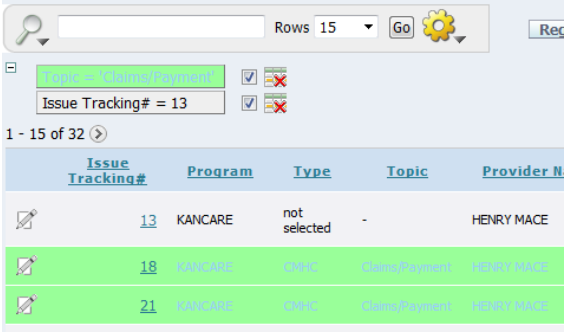
Issue Tracking Listing – Control Break on Information

How To Follow the steps in the table below to create breaks on the data information.

Step	Action
1.	<p>Select Control Break from the Control list.</p> 
2.	<p>Select the Column(s) the data will break on. Select if the Break Status is enable or disenabled.</p> 
3.	<p>Click on Apply. Report will display.</p> <p>The column selected in Step 2 will become headers.</p>

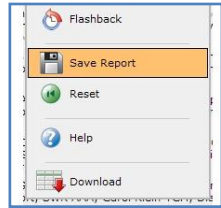
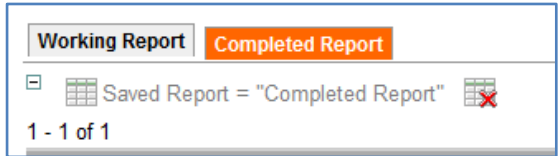
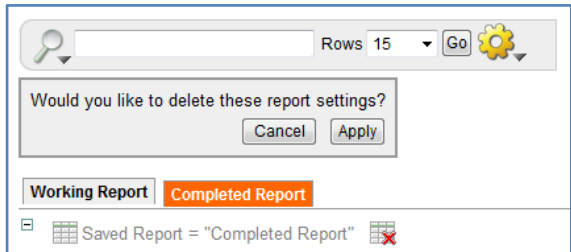
Issue Tracking Listing – Highlight Information

How To Follow the steps in the table below to apply highlights to the Report.

Step	Action	
1.	Select Highlight from the Control list.	
2.	Select the criteria for the highlight display. <ul style="list-style-type: none">• Name• Enabled• Highlight type• Background Color• Text Color• Column• Operator• Expression	
3.	Click on Apply . Report will display.	

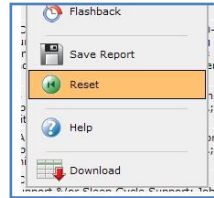
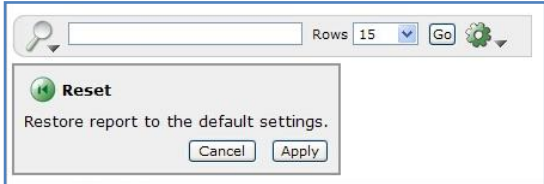
Issue Tracking Listing – Saving

How To Follow the steps in the table below to save a specialized Report.

Step	Action	
1.	Select Save Report from the Control list.	
2.	Enter the Name of the Report to be saved. This will become the Report Tab's name.	
3.	Click on Apply . Report will display on a separate tab.	
4.	<p>If the report is no longer needed, it may be deleted.</p> <ol style="list-style-type: none"> 1. Click on the delete icon (icon with red X) 2. Dialog box will display confirming deletion of the report. 3. Click on Apply. 	

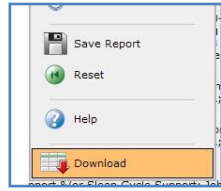
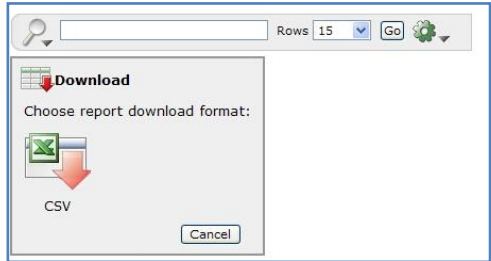
Issue Tracking Listing – Reset Report

How To Follow the steps in the table below to reset the Report back to default.

Step	Action	
1.	Select Reset from the Control list.	
2.	Click on Apply to reset the report.	

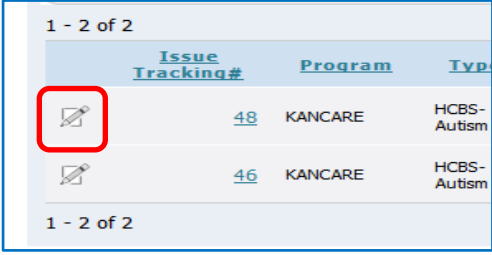
Issue Tracking Listing – Downloading Data

How To Follow the steps in the table below to download the report data.

Step	Action	
1.	Select Download from the Control list.	
2.	Click on the CSV Icon. The only option in the download format is CSV.	
3.	File download dialog box will display. Select Save .	
4.	Save As dialog box will display. Select the location (Save in) and the File name .	
5.	Browse to the File Location and Open file in Excel.	

Issue Tracking Listing Details

How To Follow the steps in the table below to access the report detail.

Step	Action	Result									
1.	<p>Under the Edit Column, click on the paper icon.</p>  <p>The screenshot shows a table with the following data:</p> <table><thead><tr><th>Issue Tracking#</th><th>Program</th><th>Type</th></tr></thead><tbody><tr><td>48</td><td>KANCARE</td><td>HCBS-Autism</td></tr><tr><td>46</td><td>KANCARE</td><td>HCBS-Autism</td></tr></tbody></table>	Issue Tracking#	Program	Type	48	KANCARE	HCBS-Autism	46	KANCARE	HCBS-Autism	The detail page will display.
Issue Tracking#	Program	Type									
48	KANCARE	HCBS-Autism									
46	KANCARE	HCBS-Autism									

Continued on next page

Issue Tracking Report Details (Continued)

Introduction Clicking on the edit icon (paper) on the Issue Tracking Listing will display the issue details.

Issue Tracking - MCO

Issue Tracking Entry (KANCARE)

Provider Information

Facility / Email / Phone:
CINDY LOU HOO / EMAIL@EMAIL.COM / 1234567489

first name:
JASPER

last name:
LEVI

Poster Issue:
We have a claim for winter clothing and it has not been paid.

Issue Posted Date: 01/24/2014 02:54 PM

Claims/Payment entries: 1 - Number resolved: 0 Number activities logged (by MCO): 0 - Number activities with Agency response: 0

[Claims/Payments Listing](#) [Issue Logging Listing](#)

MCO Response from 21

Assigned to -- not assigned -- ☐ Check to send email notice

MCO Response (entry)

0 of 4000

Resolved by MCO Date:

Issue Classifications

Program
☒ KANCARE ☐ Non-KANCARE

MCO/Agency
☒ AmeriGroup ☐ Sunflower ☐ United
☐ KDADS ☐ KDHE ☐ un-assigned

Provider Type
☐ CMHC ☐ HCBS-Autism ☐ HCBS-FE ☐ HCBS-Multiple ☐ HCBS-PD ☐ HCBS-SED ☐ HCBS-TA ☐ HCBS-TBI
☐ IDD TCM ☐ NF ☐ NF-MH ☐ OTHER ☐ PRTF ☐ SUD ☒ not selected

Topic
☐ Claim Denials ☒ Claims/Payment ☐ Client Obligation ☐ Notification Issue(s) ☐ Other ☐ Payment Rates
☐ Prior Authorization

Add Dt 01/24/2014 02:51 PM Mod Dt 01/24/2014 02:54 PM Status: **POSTED** Issue Tracking Number: **62**

[Return to Issue Tracking Listing](#) [SAVE \(Apply Changes\)](#)

Continued on next page

18

Issue Tracking Report Details (Continued)

The links displayed will be determined by the type of issue.

**Claims
Payment
Listing**

Issue Tracking - MCO

Issue Tracking Entry (KANCARE)

Provider Information

Facility / Email / Phone:
CINDY LOU HOO / EMAIL@EMAIL.COM / 1234567489

first name:
JASPER

last name:
LEVI

Poster Issue:

We have a claim for winter clothing and it has not been paid.

Issue Posted Date: 01/24/2014 02:54 PM

Claims/Payment entries: 1 - Number resolved: 0 Number activities logged (by MCO): 0 - Number activities with Agency response: 0

[Claims/Payments Listing](#) [Issue Logging Listing](#)

Issue Logging History

**Claims/
Payment
Listing**

Click on the **Claims/Payment Listing** link to view the Claims Payment Issues Listing.

Issue Tracking - State Agency

Claims/Payment Issues Listing

Rows: 15 Go Return To Issue Tracking Entry

Provider	Program Type	MCO	Billing Dt	Billed Amt	Paid Amt	Estimated Outstanding Amt	Status	MCO Comment Dt	MCO Resolved Dt	MCO Special Payment Dt	Provider Posted
PROVIDER NAME	CMHC	21	01/01/2014	2000	100	1700	POSTED	-	-	-	YES

1 - 1

Clicking on the edit icon (paper) on the Claims/Payment Issues Listing will display the Claims/Payment Entry.

Continued on next page

Issue Tracking Report Details (Continued)

The screenshot shows a web application window titled "Issue Tracking - MCO". At the top, there are two buttons: "Return to Claims/Payments Listing" and "Apply Changes". Below this is a section titled "Claims/Payment Entry". The form contains several fields and labels: "Provider Name THE PROVIDER NAME", "Billing Date 01/01/2014", "Program Type CMHC MCO [] AmeriGroup", "Billed Amt 2000", "Estimated Patient Liability Amount 200", "Estimated Payment Amount 1800", "Number of Claims Billed 6", "Number of Claims Paid 1", "Paid Amount 100", and "Estimated Outstanding Amount 1700". There is a "Poster Comment" field with the text "We need paid now." and a "Provider Posted" field with a checked "YES" checkbox and the date "01/24/2014 11:36 AM". Below these is a large "MCO Comment" text area. At the bottom of the form, there is a "TRAINING TWO" label, an "MCO Resolved" field with a checked "YES" checkbox, and an "MCO - Was a Special Payment Made?" field with an unchecked "YES" checkbox. At the very bottom, there is a status bar that reads "Status POSTED Add User TRAINING01 Add Date 01/24/2014 Mod User Mod Date".

MCO staff may enter a response in the MCO Comment field. Click on the **Apply Changes** button to save the response.

Click on the **Return to Claims/Payments Listing** button to return to the Claims/Payment Issues Listing.

Issue Logging History

Click on the **Issue Logging Listing** link to view or add to the logging list.

Click on the **Create New Activity Log Entry** button to add an activity.

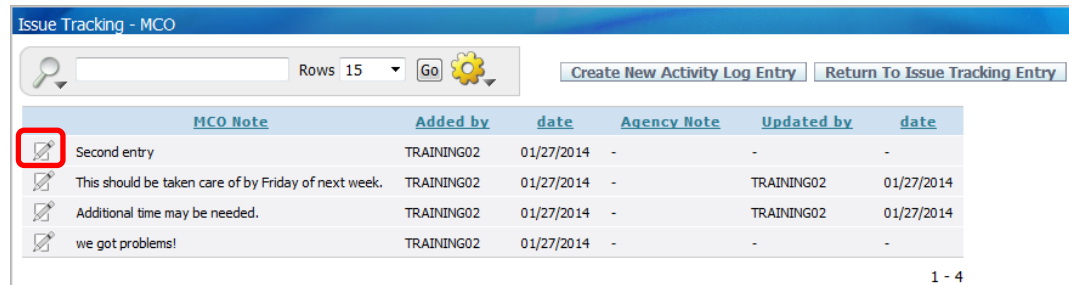
The screenshot shows a web application window titled "Issue Tracking - MCO". Below the title bar is a section titled "Issue Tracking Log Entry". At the top right of this section are two buttons: "Cancel" and "Create". Below these buttons is a large "MCO Note" text area containing the text "This should be taken care of by Friday of next week." Below the text area is a label "52 of 4000". At the bottom left of the form, there are two labels: "Add User" and "Add Dt".

MCO staff may enter a note in the MCO Note field. Click on the **Create** button to save the note. A list of activities will display.

Continued on next page

Issue Tracking Report Details (Continued)





Clicking on the edit icon (paper) on the Issue Logging Listing will display the Issue Tracking Log Entry.



Issue Tracking - MCO

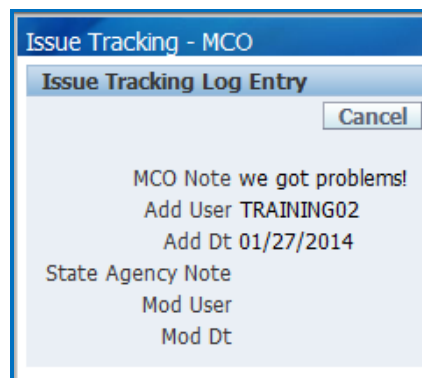
Search: [] Rows: 15 Go []

Create New Activity Log Entry Return To Issue Tracking Entry

	MCO Note	Added by	date	Agency Note	Updated by	date
	Second entry	TRAINING02	01/27/2014	-	-	-
	This should be taken care of by Friday of next week.	TRAINING02	01/27/2014	-	TRAINING02	01/27/2014
	Additional time may be needed.	TRAINING02	01/27/2014	-	TRAINING02	01/27/2014
	we got problems!	TRAINING02	01/27/2014	-	-	-

1 - 4

Clicking on the edit icon (paper) on the activity page will display the Issue Tracking Log Entry.



Issue Tracking - MCO

Issue Tracking Log Entry

Cancel

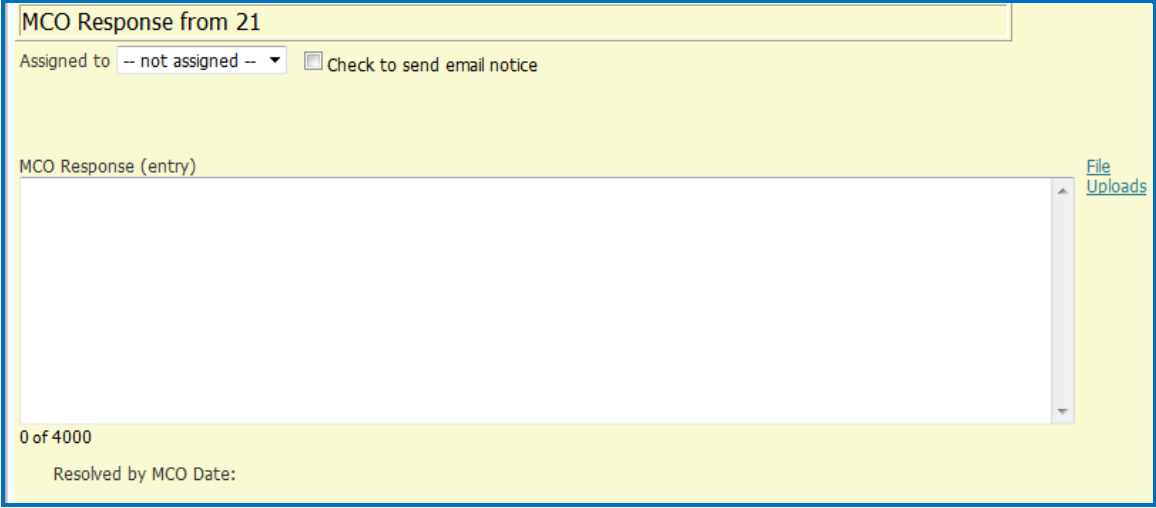
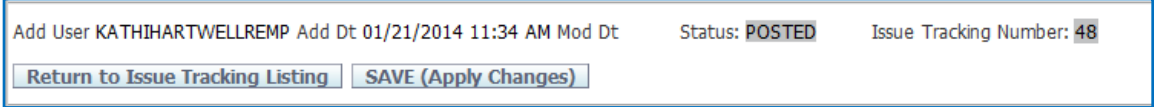
MCO Note we got problems!
Add User TRAINING02
Add Dt 01/27/2014
State Agency Note
Mod User
Mod Dt

Click on the **Cancel** button to return to the activity page.

Click on the **Return to Issues Tracking Entry** button to return to the Issue Tracking Entry page.

Issue Tracking Report Details (Continued)

Issue Response Follow the steps below to respond to the issue.

Step	Action	Results
1.	Enter the response in the MCO response field.	
		
2.	Upload files as needed.	
3.	Assign the issue to the appropriate person.	
4.	Check the Check to send email notice checkbox if needed.	
5.	Select the SAVE (Apply Changes) button.	Saves the information. Sends email as indicated.
		
6.	The response will display on the issue listing.	

Poster	MCO	Issue (display limited to 120 characters)	MCO Assigned	MCO Response (display limited to 120 characters)
HENRY MACE	AmeriGroup	Deby... did you get this? [25]	-	-
TEST USERQ	AmeriGroup	MCO selected and should be updated by MCO and set to POSTED MCO status. [71]	not_assigned	MCO entry placed here. Resolved by MCO date selected prior to applying changes. No addition information is added o
TEST USERQ	AmeriGroup	claims entered while Issue was in WIP status Posted. [58]	not_assigned	added response from MCO on claims entry, but post select is not available. Now Resolved by MCO Date select is availab
JASPER LEVI	AmeriGroup	We have a claim for winter clothing and it has not been paid. [61]	TRAINING02	We will take care of this by the first of the month.

Upload File Attachment Utility

Introduction At times, it is necessary for additional information to be attached to the report. All attached files are associated with the Issue Tracking worksheet.

How to Attach a File Follow the steps below to attach a file to a specific report.


Step	Action	Results								
1.	The Attached Files Region is on the right side of the page.									
<div><div>Attached Files</div><div><div>To Attach / Upload File:</div><div><div>Steps to Upload a File:</div><div>Browse to the file location by clicking on the "Browse..." button</div><div>Type a unique name in the "File Name" field for easy identification.</div><div>Click the "Upload or Delete File" button.</div><div>Do not upload ".docx" or ".xlsx" files.</div><div>(Save ".docx"/".xlsx" files as PDFs then upload the PDF file.)</div></div><div><div>To Delete a File:</div><div>Only the person who uploaded the file can delete the file.</div><div>Click on the checkbox next to the file to be deleted.</div><div>Click on the "Upload or Delete File" button.</div></div><div><div><div><div></div></div><div>Browse...</div><div>File(s) Uploaded 04/21/13 05:33:51 PM</div></div><div>File size limited to 1mb!</div><div>File Name: <div></div><div>Upload or Delete File</div></div><div><div><div><div></div></div><div>Go</div><div><div></div></div></div><div>No data found.</div></div></div></div></div>										
2.	In the Attachments region, click on the Browse button	The “Choose File to Upload” dialog box displays.								
3.	Browse to the saved document to be attached.	For best results attach only the following type of documents:								
	<table><tr><th>Document Type</th><th>Action</th></tr><tr><td>Word or Excel</td><td>Convert documents to Acrobat Reader format (pdf) before attaching</td></tr><tr><td>PDF (Acrobat)</td><td>Attach with no additional steps needed</td></tr><tr><td>Graphics</td><td>Attach JPG or GIF type graphics – do not attach TIF files</td></tr></table>		Document Type	Action	Word or Excel	Convert documents to Acrobat Reader format (pdf) before attaching	PDF (Acrobat)	Attach with no additional steps needed	Graphics	Attach JPG or GIF type graphics – do not attach TIF files
Document Type	Action									
Word or Excel	Convert documents to Acrobat Reader format (pdf) before attaching									
PDF (Acrobat)	Attach with no additional steps needed									
Graphics	Attach JPG or GIF type graphics – do not attach TIF files									

Continued on next page

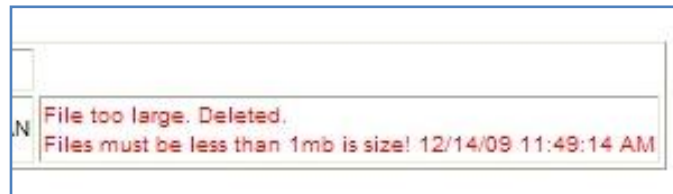
Upload File Attachment Utility (Continued)

How to Attach a File continued

Step	Action	Results
4.	On the Choose File to Upload dialog box, click on Open button	File is selected and entered into the Upload File field.
5.	Enter a Name in the File Name field.	
6.	Click on Upload or Delete File button	Completes the upload. Table of the attached files is displayed.

Attached Files					
					
View	Document	Size	Source	Add Dt	Add User
view	contact list of customer	462387	Contact List.pdf	04/21/2013 05:33:51 pm	DEBYZIMMERMAN
1 - 1					

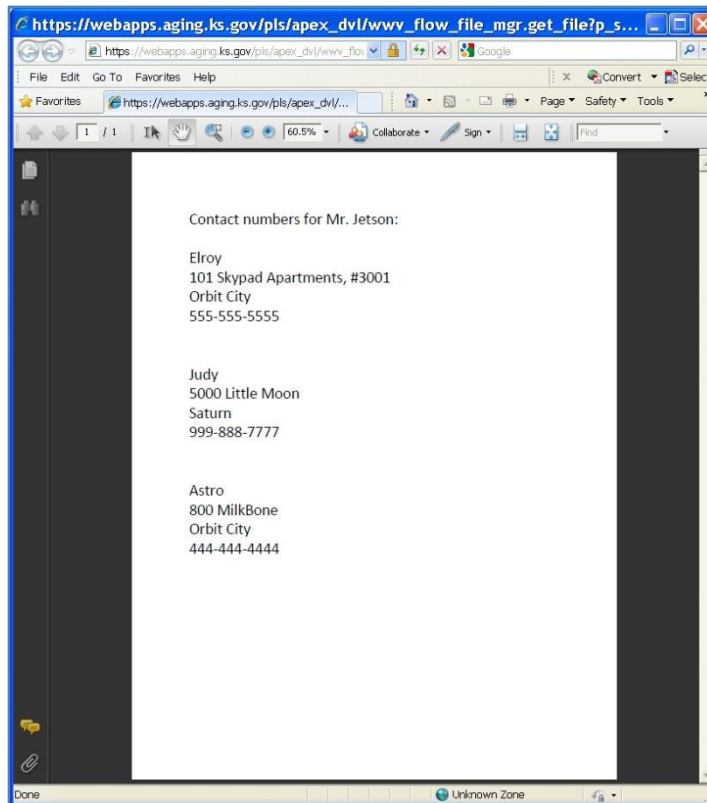
Note: If the file is too large, a warning notice will be displayed that the file was too large and was deleted.



Viewing an Attachment

How to View the File Follow the steps below to view an attached file on a specific report.

Step	Action	Results
1.	Click on the file name	"Contact Listing" in the above example
2.	The document will open in a separate window.	



Deleting an Attachment

Introduction The delete option is only available to the user who originally attached the file.

How to Delete a File Follow the steps below to delete an attached file on a specific report.

Step	Action	Results														
1.	In the Attachments region, click on the check box under the delete column.															
<div><div>Attached Files</div><div><div>To Attach / Upload File:</div><div><div>Steps to Upload a File:</div><div>Browse to the file location by clicking on the "Browse..." button</div><div>Type a unique name in the "File Name" field for easy identification.</div><div>Click the "Upload or Delete File" button.</div><div>Do not upload ".docx" or ".xlsx" files.</div><div>(Save ".docx"/".xlsx" files as PDFs then upload the PDF file.)</div><div>To Delete a File:</div><div>Only the person who uploaded the file can delete the file.</div><div>Click on the checkbox next to the file to be deleted.</div><div>Click on the "Upload or Delete File" button.</div></div><div><div><div><div></div><div>Browse...</div></div><div>File(s) Uploaded 04/21/13 05:57:28 PM</div></div><div>File size limited to 1mb!</div><div>File Name: <input type="text"/></div><div>Upload or Delete File</div></div><div><div><div><div><div></div><div>Go</div><div></div></div><div></div></div></div><div><table><tr><th>View</th><th>Document</th><th></th><th>Size</th><th>Source</th><th>Add Dt</th><th>Add User</th></tr><tr><td>view</td><td>contact list</td><td><input type="checkbox"/></td><td>462387</td><td>Contact List.pdf</td><td>04/21/2013 05:57:28 pm</td><td>DEBYZIMMERMAN</td></tr></table></div><div>1 - 1</div></div></div></div>			View	Document		Size	Source	Add Dt	Add User	view	contact list	<input type="checkbox"/>	462387	Contact List.pdf	04/21/2013 05:57:28 pm	DEBYZIMMERMAN
View	Document		Size	Source	Add Dt	Add User										
view	contact list	<input type="checkbox"/>	462387	Contact List.pdf	04/21/2013 05:57:28 pm	DEBYZIMMERMAN										
2.	Click the Upload or Delete File button.	File is deleted from the system.														

Logging-Out

Introduction When the user will not be using the application for a period of time, log off the program for security reasons.

How To Follow the steps in the table below to exit the application.

Step	Action	Result
1.	In the upper right corner of the window, there are three navigational options.	

Link	Action
Logout	The browser will return to the Log-in page
KDADS Home Page	Returns back to the KDADS Home Page for further access options.